

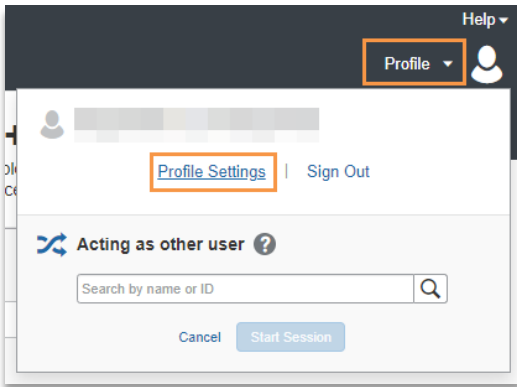


Delegate Roles

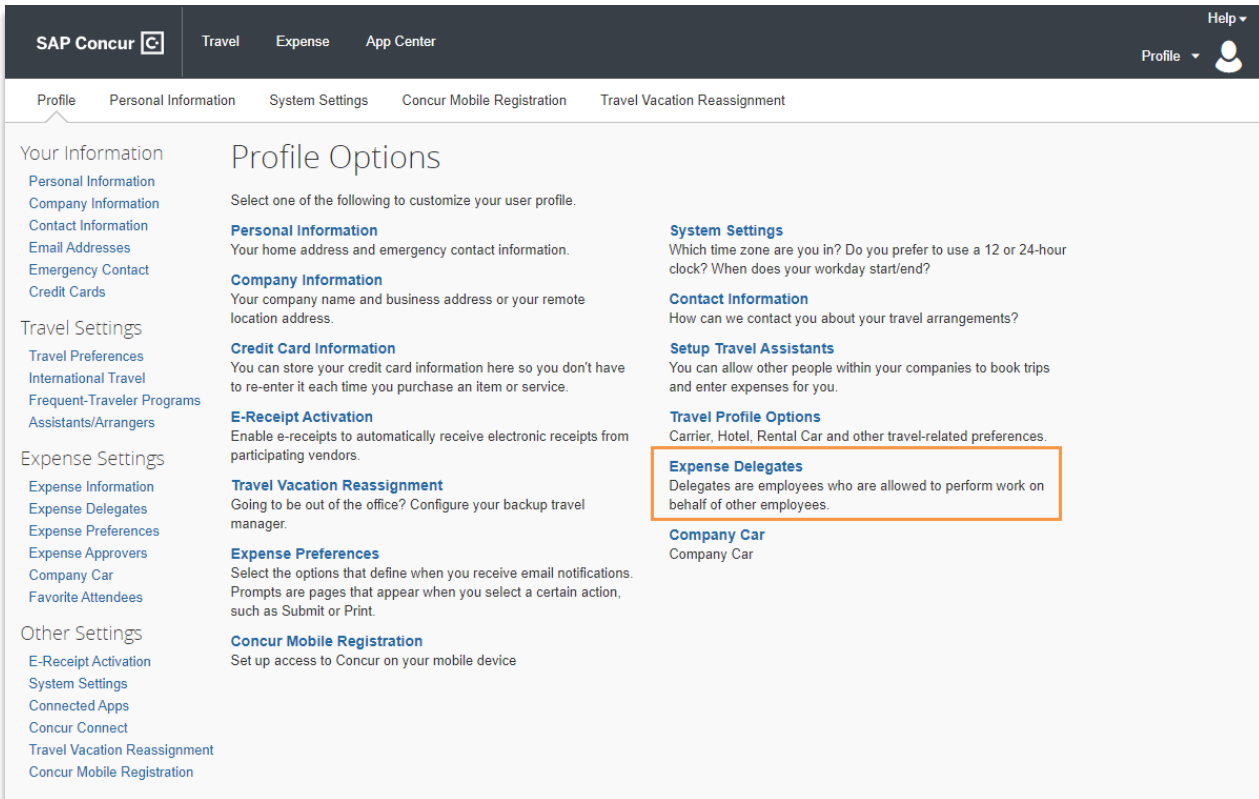
Employees can be added as delegates to perform different actions on the expense reports for other employees.

Create a Delegate

In order to set up a delegate, log into Concur and select the Profile drop down at the top right of the screen and select Profile Settings.



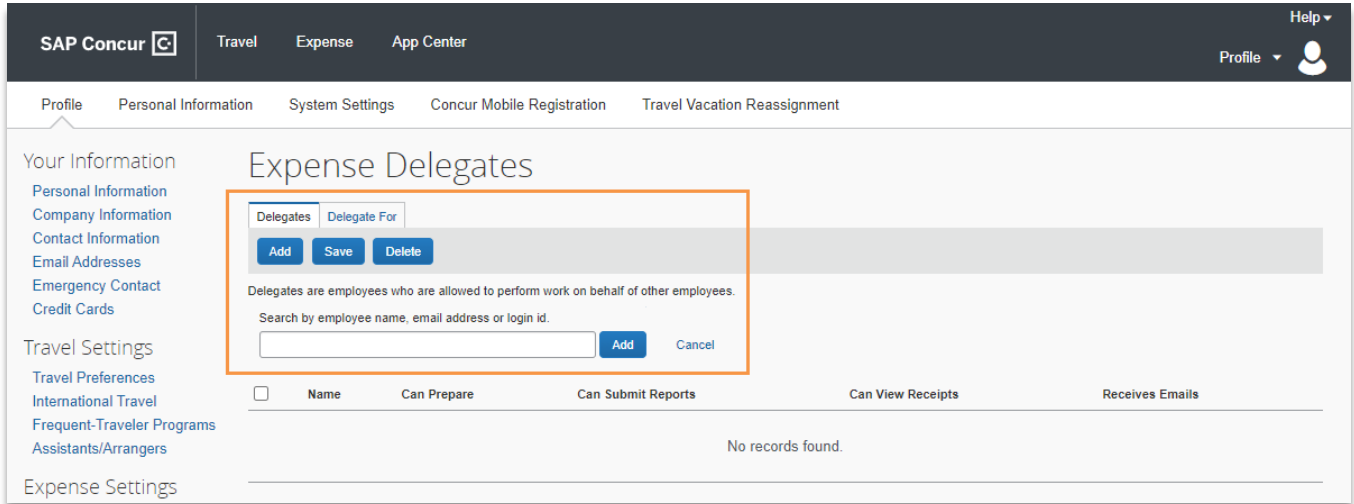
Select the Expense Delegates link to select your delegate.



Concur: Creating a Delegate

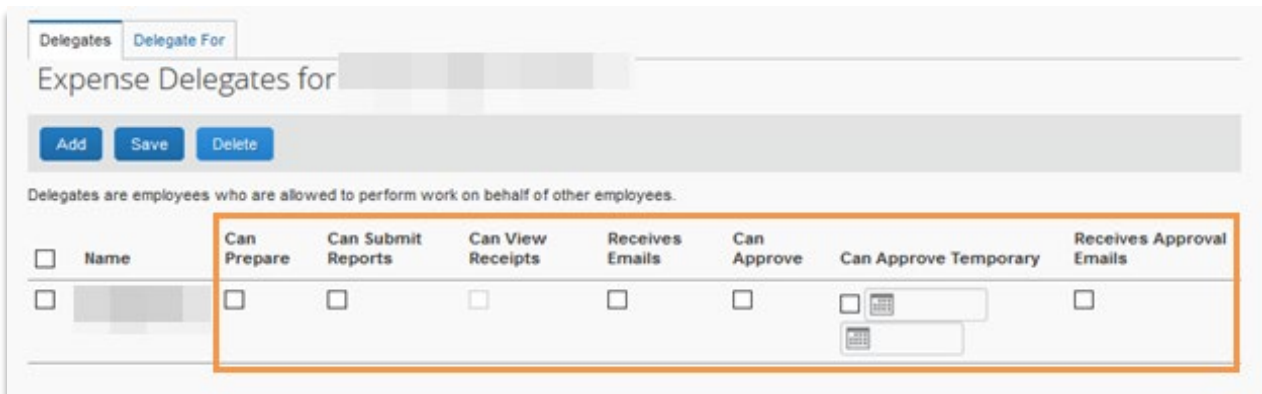
Click the Add button to add a new delegate, the Save button to save your changes, or the Delete button to delete a delegate.

When you click the Add button a new search text box opens. You can search by name, email address, or OHIO ID.



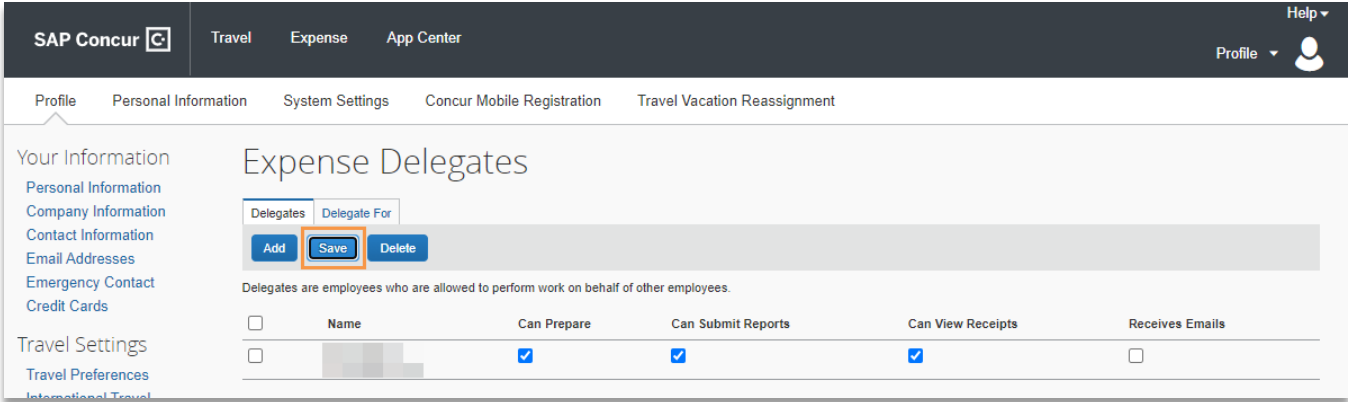
Once you have found your delegate you must decide what role(s) you would like them to have. Place a checkmark in the box under the role(s) you would like to assign.

- Can Prepare - Delegate **can prepare** reports on behalf of delegated employee.
- Can Submit Reports - Delegate can **submit reports** on behalf of delegated employee.
- Can View Receipts - Delegate can **view receipts** on behalf of delegated employee.
- Receives Emails - Delegate can **receive email notifications** on behalf of the delegated employee. In this case both the delegate and the delegated employee will receive email notifications.
- Can Approve - Delegate can **approve** expense reports on behalf of the delegated employee. **Note:** For the delegate to be able to approve expense reports on behalf of the delegated employee, the delegator must be setup as **“Expense approver”** in their user profile.

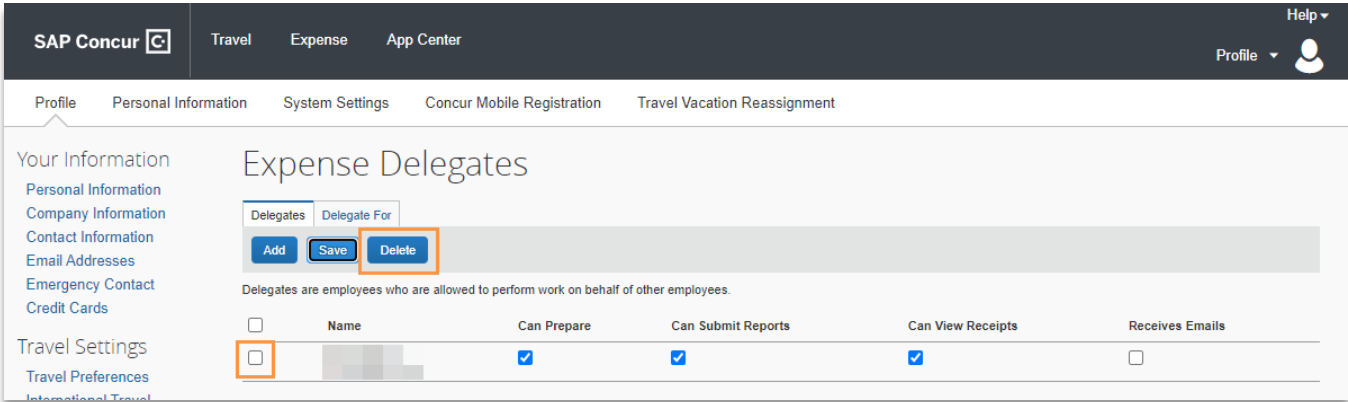


After you have added your delegate(s) and assigned role(s), click the Save button to save your changes.

Concur: Creating a Delegate



To delete a delegate, place a check in the box to the left of the username and click the delete button. You will see a pop up warning from Concur asking if you are sure, but not to worry, if you accidentally delete the wrong delegate, you can always go back and add them again.



To see if you are the delegate for someone else, select the Delegate For tab. If you are a delegate, you can see what roles you have been assigned.